Customer Care Center

Instructions for Completing the Agency Contact Spreadsheets for the Integration Phase

In an effort to minimize the impact of transition on agencies during the integration phase, VITA has taken deliberate steps to reduce or eliminate previous contact information requirements which either can be ignored or postponed to the transformation phase.

A review has been completed and significant reductions have been made to the original requirements of the VITA Customer Care Center (VCCC) for Agency Contact Information. Accordingly, instructions for filling out the spreadsheets have been modified:

- ***For the Integration Phase of the Large Agency Transition, the VCCC is asking that only staff with assigned roles be entered into the spreadsheets at this time. This may change during the Transformation Phase.***
- ***The primary physical locations that appear in the Asset Portfolio for your agency have been listed next to your agency ID code in the tabbed worksheet entitled "Location ID". Please verify that the location information in this worksheet is accurate. If not, please make any additions, deletions or corrections to the location list.***

Overview

An essential element in providing the best possible service is taking the time to learn about our customers, their employees, and their roles in the organization. Understanding the organization of your agency, and learning who the appropriate points of contact are will enable VITA to personalize our service to the unique needs of your organization, and to ensure that those requesting services are authorized to act on behalf of your agency.

When a customer calls the VITA Customer Care Center (VCCC), the contact information in the database is automatically entered into the ticket by the system as the help desk professional logs the request. This information is confirmed by the help desk professional and any additions or corrections can be made in real time.

Automatically populating the contact information from the VCCC customer database ensures accuracy, efficiency, and prompt ticket entry. A customer who calls the VCCC and is absent from the database will be required to provide contact information to the service desk at the time of the call. If the request requires procurement authority or security clearance, the VCCC may not be able to satisfy the request until the identity and capacity of the caller has been confirmed.

Description of Contact Records

VITA will maintain a contact record for each member of the customer agency who has an assigned role and might contact the VCCC. Each contact record contains the following data fields:

- **Agency Code** (four digit agency id)
- **Name** (Last, First, Middle Initial)
- **Office Phone No**. (Area code + 7 digit number + ext.)
- **E-Mail Address**
- **Role** (A contact may be assigned any number of roles; there are 12 assigned roles listed in the drop down menu. Please note: You do not need to assign the role "Other" to any of the contacts; the system automatically assigns the number 9 role "Other" to all contacts by default. Consequently, everyone in the agency will have at least one assigned role.)
- **Birth Date** (This will be used for purposes of authentication of caller identity. Please provide the birth date if missing.)
- **Last 4 digits of SSN#** (For privacy reasons, VITA has only received the last 4 digits of the SSN from DHRM. This will be used for purposes of authentication of caller identity. If the SSN # field is blank, only the last four digits should be provided).
- **Fax No.** (if available; optional)
- **Pager No**. (Mandatory only for Agency Heads, AITRs, and Emergency Contacts and will be used only in the event of an emergency.)
- **Home Phone No**. (Mandatory only for Agency Heads, AITRs, and Emergency Contacts and will be used only in the event of an emergency.)
- **User Type:** (Customer (Contact) and/or IT Service Representative (Rep).)

VCCC Contact Database Extract (Excel file)

VITA pre-populates the agency contact spreadsheet with employee data from PMIS. While full time employees (FTE's) and most P14's are usually included, please note that PMIS does not include contractors and may not include the most recent hires or some P14s. Any contact information which is missing for users who have an assigned role must be provided by the agency to VITA. Also, any inaccurate contact information for users with an assigned role needs to be corrected.

In order to facilitate this process and make this task as effortless as possible for the customer, VITA has drawn on information available from multiple sources to prepare a spreadsheet containing contact information for the personnel in your agency. While every effort has been made to compile a complete and accurate record of contact information for your agency, the source information may contain errors, omissions, or data that has changed.

In the attached Excel file, VITA has replicated a list of people identified in DHRM payroll records as employees at your agency. When you compare the VITA list to your records, you will discover that VITA already has the information for most of the contacts in your organization. For contacts listed in the spreadsheet, the only missing contact data will normally be:

1. Primary physical office location (Optional)
2. Rep/Contact/Both
3. Assigned role id(s)

1. Primary physical office location

In order to maintain consistency of the location data, a location id is assigned to each physical location of the agency.

2. Rep/Contact/Both

Any agency IT employee who has been mapped to VITA will be designated as a VITA Service Representative (Rep). All agency employees who will continue to be employed by the agency will be designated as customer agency contacts (Contact). Agency IT representatives (AITRs and their designees) will be permitted to update tickets in the system and, as customer users, may also need to call their own service needs into the VCCC in which case, they may be designated as both rep and contact in the system.

3. Assigned roles

There are a total of 12 assigned roles so there will be only a select few people in your organization who will have a VITA role. As was stated earlier, please note that it is possible for one individual to have multiple roles at the agency and in some instances, there may be more than one individual assigned a role (e.g. an AITR designee may also be primary IT security contact).

Instructions for Updating the VCCC Contact Spreadsheet

In order to complete an update of the contact data for your agency, VITA has exported the contact data in the VCCC Contact Database to an Excel Workbook with the following worksheet tabs:

Contact Database tab (Agency contacts list).

Role ID tab (The organizational roles; only a select few individuals will have a role. There may be a dozen or so individuals assigned a single role in your agency or there may be fewer individuals assigned multiple roles in the agency).

Location ID tab (If your agency has multiple locations, the drop down menu under "Location ID" contains a list of all agency locations. Please select the appropriate location for each agency contact from the drop down list. If a location is missing from the drop down list, you can add locations in the spaces provided below your agency's last listed location in the Location ID worksheet).

Step 1:
Validate the information for contacts that are in the spreadsheet. Please check that there are no blanks for required fields. If any information in the spreadsheet is incorrect, please make corrections as appropriate. Remember to confirm that the following information has been provided for each contact:

- Select the correct physical location for each contact from the drop down list and any specific room, suite, office, floor, etc. information in the office location field (Optional)
- Select from the drop down list whether the contact is a rep, contact or both.
- Select from the drop down list, the role(s) assigned to the contact.

Step 2:
Add any agency employees or contractors missing from the spreadsheet who have an assigned role. These individuals should be added to the spreadsheet and all required fields completed by the agency, same as above.

Note: *As you add contacts to the spreadsheet, be sure to copy drop down lists into those fields which provide selections for location id, rep/contact designations, and roles.*

Step 3:
Save a copy for your records and return a copy to your SLD or the VCCC Administrator.

FAQs

Who should be included in the contact database?

Any person working for the agency including FTE, P14, and contractors who:

- May occupy one or more of the following roles defined by VITA - Agency Head, Agency IT Representative (AITR), AITR designee, Agency POC, Telco Coordinator, IT Procurement Contact, VITA Services Billing Contact, Security Contact or Emergency Contact).

What do I do if one of the physical locations of our agency is not included in the location id listing?

If an agency location exists that may require service is not included in the spreadsheet, then go to the Location ID worksheet located at the Location ID tab and add the location in one of the blank spaces which follows your agency locations. Please leave the sequence number blank. Any location you add will automatically appear as a choice in the drop down list in the contact worksheet. If you need to add more locations than the blanks provided, please see your Service Level Director for assistance.

The physical location description should include Office Building, Street Address, City, State, and Zip.

What if the information you have requested about an individual does not exist?

If this should occur, please type NA in the field, which will indicate that the information is not available and that you did not simply overlook the blank field.

Why is it necessary for VITA to have accurate, complete contact information?

When someone calls into the VITA Customer Care Center (VCCC) to request new services or to report a service problem, VITA needs to be able to identify the caller in order to log the request and forward a ticket containing the correct customer contact information to the service staff so that they can be dispatched to the appropriate location or coordinate a response with the customer.

All contacts at the agency who use VITA services and who may require assistance from VITA will need to be in the system at the time of the call. Otherwise there will be a delay in processing the request until the caller's contact information can be entered into the system and verified.

If the agency contact should request services that require procurement authority or security clearance, it may be necessary to authenticate that the caller is who they say they are and to confirm that they have the authority to make certain requests on behalf of the agency. In these cases, the agency must assign individuals to specific roles and the

VCCC must be able to positively identify these callers by asking information that only the authorized person would know.

The information that is required in order to process these requests is the last 4 digits of the caller's social security number and/or their birth date. This information is available for all agency employees in PMIS. VITA takes the information that is available in PMIS, exports it to a spreadsheet and asks the agency to validate the information and add any records for any employees or contractors who may be absent. In most cases, the agency will only be required to validate that which we already have in the VCCC contact database.

What are the 12 Assigned Roles?

1. VITA On-site POC: An on-site VITA employee or designee to act as day-to-day POC for VITA operational issues, questions, or communications.
2. Service Level Director: A VITA employee responsible for overseeing VITA service delivery and on-site VITA IT staff.
3. Enterprise Service Director: A VITA employee responsible for overseeing VITA service delivery for all agencies within a specific affinity group or secretariat
4. Agency IT Resource: An agency employee selected by the agency head to be the in-agency champion for implementing VITA changes and services.
5. Telco Coordinator: An agency employee authorized to request changes to service or additional telecommunications services for the agency.
6. IT Procurement Contact: An agency employee authorized to order and purchase IT services on behalf of the agency.
7. VITA Billing Contact: An agency employee authorized to address VITA services billing issues.
8. Primary IT Security Contact: An agency employee responsible for IT Security at the agency.
9. Other: All contacts will automatically be assigned the number 9 role "Other" by default. Consequently, everyone in the system has at least one role.
10. Agency Head: Chief executive of the agency.
11. AITR Designee: An agency employee who is chosen by the AITR to perform tasks assigned to the AITR. Individual designees may be authorized to act on behalf of the AITR and have access to view tickets in the VCCC system.
12. Emergency Contact: An agency employee who will be responsible for acting as primary contact for the agency in case of an emergency.